



Office of Public Affairs
P.O. Box 1802
Sacramento, CA 95812-1802
Telecommunications Device for the Deaf - (916) 795-3240
(916) 795-3991, Fax (916) 795-3507

May 13, 2008

AGENDA ITEM 11

TO: MEMBERS OF THE BENEFITS AND PROGRAM ADMINISTRATION COMMITTEE

- I. SUBJECT:** *"California Connects"* 2008 Proposal
- II. PROGRAM:** Offices of Public and Governmental Affairs
- III. RECOMMENDATION:** For Information
- IV. ANALYSIS:**

Background

In 2007, the Office of Public Affairs (PAOF) partnered with the Office of Governmental Affairs (GOVA), in a pilot program, *"California Connects"* to recruit and brief CalPERS member volunteers to accompany staff on visits to four freshmen Assembly members in their districts.

PAOF and GOVA provided routine updates to the Board during the program's progression, and a final assessment was presented to the Board at the July 2007 Offsite. This Item briefly summarizes the 2007 pilot for reference, describes the implementation plans for 2008, and extends an invitation to Board members to participate.

2007 Pilot Program

Teams of three volunteers and two staff were provided talking points, CalPERS background information and legislative visit protocols. Equipped with both a district profile and recent data on benefit payments and their economic ripple effect in the district, each volunteer team spent 30-60 minutes educating the legislator about CalPERS economic impact.

Objective

The overarching objective was to create a balanced viewpoint in the marketplace and ensure the value generated by CalPERS is well understood by opinion leaders.

Components

- Research and develop key messages demonstrating CalPERS economic impact;

- Recruit, train and support a cadre of effective CalPERS volunteers specific to each region who are committed to the program; and
- Conduct relationship-building legislative visits with key Central and Northern California legislators in their district offices.

Results

The pilot demonstrated that personalized district visits help legislators understand and see CalPERS as a constituent. The volunteers effectively educated the legislators, clearly communicating CalPERS role in the legislators' communities. The information provided to the legislator focused on CalPERS as a contributor to the local economy, which illuminated the broader impact CalPERS makes to the State. The information was well received by each legislator and the visits resulted in a deeper awareness of CalPERS.

2008 Program Plan

After assessing the accomplishments of the Pilot, and the resources that both Divisions could apply to the program in 2008, a variety of scenarios were put forth and discussed. The consensus was to set the goal of meeting with at least 10 Members.

Legislators generally return to their districts on Fridays and during recesses. While it's easier to spread meetings over the course of months by scheduling on Fridays, it's also a fact that Members often have many meetings and appointments on Fridays, and scheduling opportunities may be better during recess.

While the Legislature cannot recess for the summer break unless the annual Budget Act has been approved, in practice, most Members will spend much of this time at home, unless specific Floor or Committee sessions are scheduled. Therefore, PAOF and GOVA are concentrating on scheduling meetings during late July and early August.

Selection of Legislators

The targeted Members were chosen with an eye toward cultivating stronger relationships with Legislators who meet some of the following important factors:

1. Large number of active and retired CalPERS members in district
2. Substantial CalPERS district investment (stocks, real estate, private equity funds)
3. Large number of contracting employers in district
4. Leadership position in Legislature
5. Leadership/membership on key policy or fiscal committees
6. Leadership/membership in specific caucuses

For the sake of efficiency, meetings will be set up on the same day with two or three different Member offices that are in close proximity. GOVA is in the process of scheduling these meetings.

The planned meetings are:

1. Central Valley

- Asm. Juan Arambula (D-31) Fresno
- Asm. Mike Villines (R-29) Clovis Minority Floor Leader
- Sen. Dave Cogdill (R-14) Modesto

2. Local Members

- Sen. Dave Cox (R-1) Northern California
- Asm. Lois Wolk (D-8) Davis
- Asm. Dave Jones (D-9) Sacramento

3. East Bay Area/Silicon Valley

- Sen. Ellen Corbett (D-10) East Bay
- Asm. Alberto Torrico (D-20) East Bay
- Sen. Joe Simitian (D-11) Palo Alto

4. Northern California

- Asm. Noreen Evans (D-7) Santa Rosa
- Asm. Jared Huffman (D-6) San Rafael

Selection of Ambassadors

In 2007, PAOF conducted a focused volunteer recruitment effort by coordinating with employee organizations and then following up with individuals. Thirty-five prospects came forward, of which thirteen constituents agreed to participate. PAOF then developed training materials designed to expedite familiarization with the key messages, build a sense of teamwork, and hone legislative visitation skills. A briefing binder containing CalPERS background, economic data, a script of talking points, an Assembly Member profile, and a legislative visit "tip sheet" was mailed to each volunteer. A Teleconference training and a follow-up in-person meeting were conducted. These volunteers will be approached for participation in 2008, and new volunteers will be recruited.

Board involvement

Board Member involvement and participation in these meetings could greatly enhance their impact and the strength of the resulting relationships. We encourage any Board Members interested in participating in these visits to contact Wendy Notsinneh, Chief, Office of Governmental Affairs, or Pat Macht, Assistant Executive Officer, Office of Public Affairs.

October Employer Conference

The 2008 Employer Conference in Indian Wells presents another possible opportunity to set up some meetings in Southern California. Three possible scenarios have been discussed:

1. Attempt to meet with the nominees of the party most likely to be elected in the Palm Springs region;
2. Attempt to meet with incumbent members in the Inland Empire, approximately 60-90 minutes away; or
3. Attempt to meet with incumbent and/or likely new members in the San Diego region, approximately 2.5 hours away.

GOVA and PAOF will be discussing these possibilities further, and the outcomes of the summer meetings may play a part in the decisions.

Next steps:

GOVA and PAOF will work together to coordinate meetings, recruit and train ambassadors, schedule with Executive Staff and conduct outreach to Board members. GOVA will take the lead in working with the legislative offices and PAOF will take the lead in recruiting ambassadors.

This innovative partnership has tremendous potential to enhance CalPERS profile around the state, as well as in the Capitol itself. GOVA and PAOF plan to provide the Board with a report on the outcomes of the visits toward the end of the year.

V. STRATEGIC PLAN:

This item supports Strategic Plan **Goal IV**, by designing and developing education and communication initiatives to ensure broad member and stakeholder understanding of CalPERS value.

VI. RESULTS/COSTS:

There are no additional costs associated with this information item.

PATRICIA K. MACHT
Assistant Executive Officer
Office of Public Affairs

WENDY NOTSINNEH
Chief, Office of Governmental Affairs

GLORIA MOORE ANDREWS
Deputy Executive Officer - Operations